Welcome to…

IDIQ/BOA/BPA Processing

Welcome and Introductions

Course Prerequisites

- ✓Change Discussions
- ✓RWD SAP 4.6C

Course Objectives

- At the end of this course, you should be able to use SAP to:
  - Award Contracts
  - Issue Tasks

Benefits of IDIQ/BOA/BPA Processing

- SAP provides an automated means to:
  - Award contracts
  - Issue tasks

Course Schedule

	Agenda Item	Time (hr)
1.	Introduction	00:10
2.	Background	00:15
3.	Topic 1: Award Contract	01:30
4.	Topic 2: Issue Tasks	01:00
5.	End of Course Review/Feedback	00:05
Total Course Time		**03:00 hrs**

Course Structure

- Process Flows
  - Overview of key business processes and related SAP concepts
- Demonstrations
  - Trainer-led examples of key SAP transactions
- Activities
  - Real-life business tasks using Core Financial business procedures
- Training Course Feedback
  - Assessment of course effectiveness using the Training Evaluation Form

On-Line Quick Reference

- Purpose of the On-Line Quick Reference (OLQR) tool:
  - Provide procedures, job aids, and Help content via the Intranet
  - Assist during and after Instructor-Led Training (ILT) and Web-Based Training (WBT)

Prepare Your Workspace

- Take a few minutes to prepare your training workspace:
  - Review the reference materials; become familiar with the content
  - Logon to SAP R/3

Background Knowledge

Background Knowledge

- Key definitions:
  - **Collective Number** – This is the solicitation number. The format for the solicitation number is a two digit FY-three digit Pgroup-three digit sequence number (I.e. 02-MBD-001).
  - **Contract** – In SAP, this is the term used for ID/IQs, BOAs, and BPAs. It is also the title of the actual transaction window where ID/IQs, BOAs, and BPAs are created.
  - **Expected Value** – Value that the unplanned services or materials covered by the line items are not expected to exceed. This is the commitment/obligation amount. It is the equivalent to the Valuation Price for supplies.
  - **Item Category** – Identified indicating the characteristics of an item as either a Supply (Z) or Service (D).

Background Knowledge

- Key definitions (continued):

  - **Messages** – Tool within SAP for printing, faxing, and emailing.
  - **Our Reference** – An SAP field that is used to record the DPAS rating.
  - **Outline Agreement** – In SAP, this is the transaction window where ID/IQs, BOAs, and BPAs are prepared.
  - **Overall Limit** – Maximum value that the total of all unplanned services or the value of materials covered by the line items may not exceed. The Overall Limit is equal to the Expected Value for the line item.

Background Knowledge

- Key terms & definitions (continued):
  - **Purchase Order** – In SAP, this term refers to any award document that obligates funds, including: Commercial Purchase Orders, Noncommercial Purchase Orders, A-E Orders, Midrange Contracts, NDPR, NSMS Orders, Contracts, Grants, Cooperative Agreements, Task Order/Delivery Orders for NASA Contracts, Task Order/Delivery Orders for other agency contracts, Space Act Agreements, and SBIR/STTRs. It is also the name of the transaction window where these documents are created.
  - **RFQ** – In SAP, this term refers to any type of solicitation including: Invitation for Bids (IFB), Cooperative Agreement Notice (CAN), NASA Research Announcement (NRA), Commercial Item Solicitation, Announcement of Opportunity (AO), Request for Offer (RFO), Request for Proposal (RFP), and Construction Non-Midrange Solicitation.
  - **Sales person** – The person who signed the Offer for the Vendor.

Background Knowledge

- Key terms & definitions (continued):
  - **Total Estimated Requisition Amount** – Total value of the Purchase Requisition to include all Options.
  - **Unplanned Services** - Services that cannot be specified in detail because their precise nature and scope are not initially known, or services which – for various reasons – you do not wish to plan.
  - **Valuation Price** – Price per unit that is committed on the Purchase Request for supplies. It is the equivalent to the Expected Value for Services.
  - **Your Reference** – An SAP field used to identify a TO/DO issued against another agency contract (I.e. GSA contract) or against a NASA ID/IQs, BOAs, and BPAs that was created using the Purchase Order transaction window (ME21N). Enter the referenced contract number in this field; and for contracts that have been novated, enter the old contract number on the new contract.

Background Knowledge

Differences between SAP and the previous system

Old System:

- Small Purchase System (SPS)
- Word Templates
- Interim Document Generation System (IDGS)
- PROMIS/AMS

SAP System:

- Integrated System
- Automated process for preparing, approving, distributing and tracking procurement documents

- IDGS
- AMS (507 Data)

Process Purchases Overview

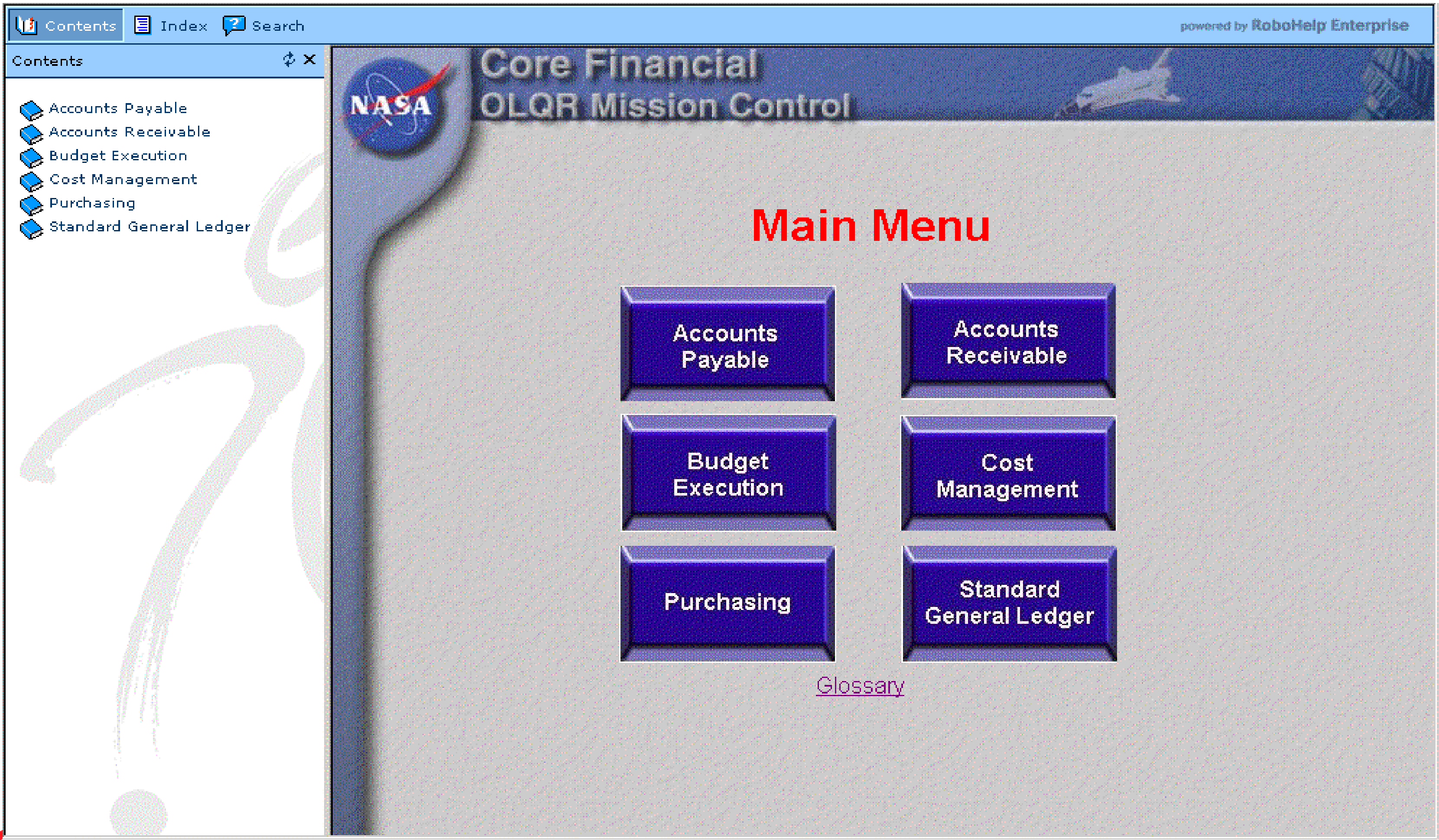
- Plan Acquisition
- Initiate Acquisition Request
- Perform Pre-Solicitation Activities
- Solicit Offers
- Evaluate Offers
- **Award Contract**
- **Issue Tasks**
- Monitor Performance
- Modify Contract
- Accept Deliverables
- Review Invoice
- Close-out Contract
- Maintain Material Master Data
- Maintain Templates

Topic 1

Award Contract

Topic 1: Process Flow

- Perform Award Contract Activities Process Flows from the OLQR



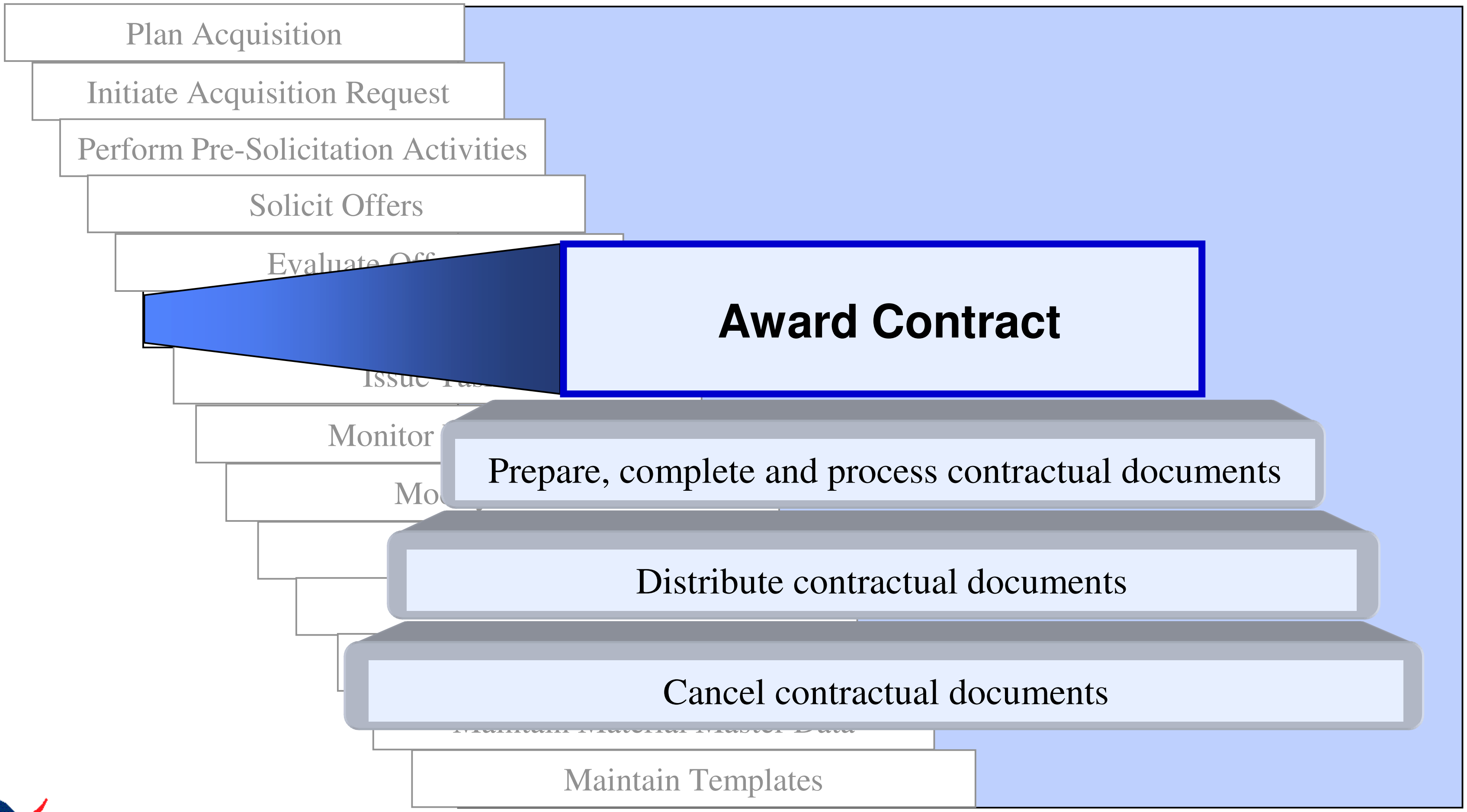
Contents
Index
Search
powered by RoboHelp Enterprise
Contents
NASA
Core Financial
OLQR Mission Control

Accounts Payable
Accounts Receivable
Budget Execution
Cost Management
Purchasing
Standard General Ledger

Main Menu

Accounts Payable
Accounts Receivable
Budget Execution
Cost Management
Purchasing
Standard General Ledger
Glossary

Topic 1: Overview


Plan Acquisition
Initiate Acquisition Request
Perform Pre-Solicitation Activities
Solicit Offers
Evaluate Off
Issue Tas
Monitor
Mo
Maintain Material Master Data
Maintain Templates

Award Contract

- Prepare, complete and process contractual documents
- Distribute contractual documents
- Cancel contractual documents

Topic 1: Objectives

- Upon completion of Award Contract, you should be able to accomplish the following:
  - Understand Award Contract Process Flow
  - Prepare, Complete, and Process Contractual Documents
  - Distribute Contractual Documents
  - Cancel Contractual Documents

Demonstrations and Exercises Introduction

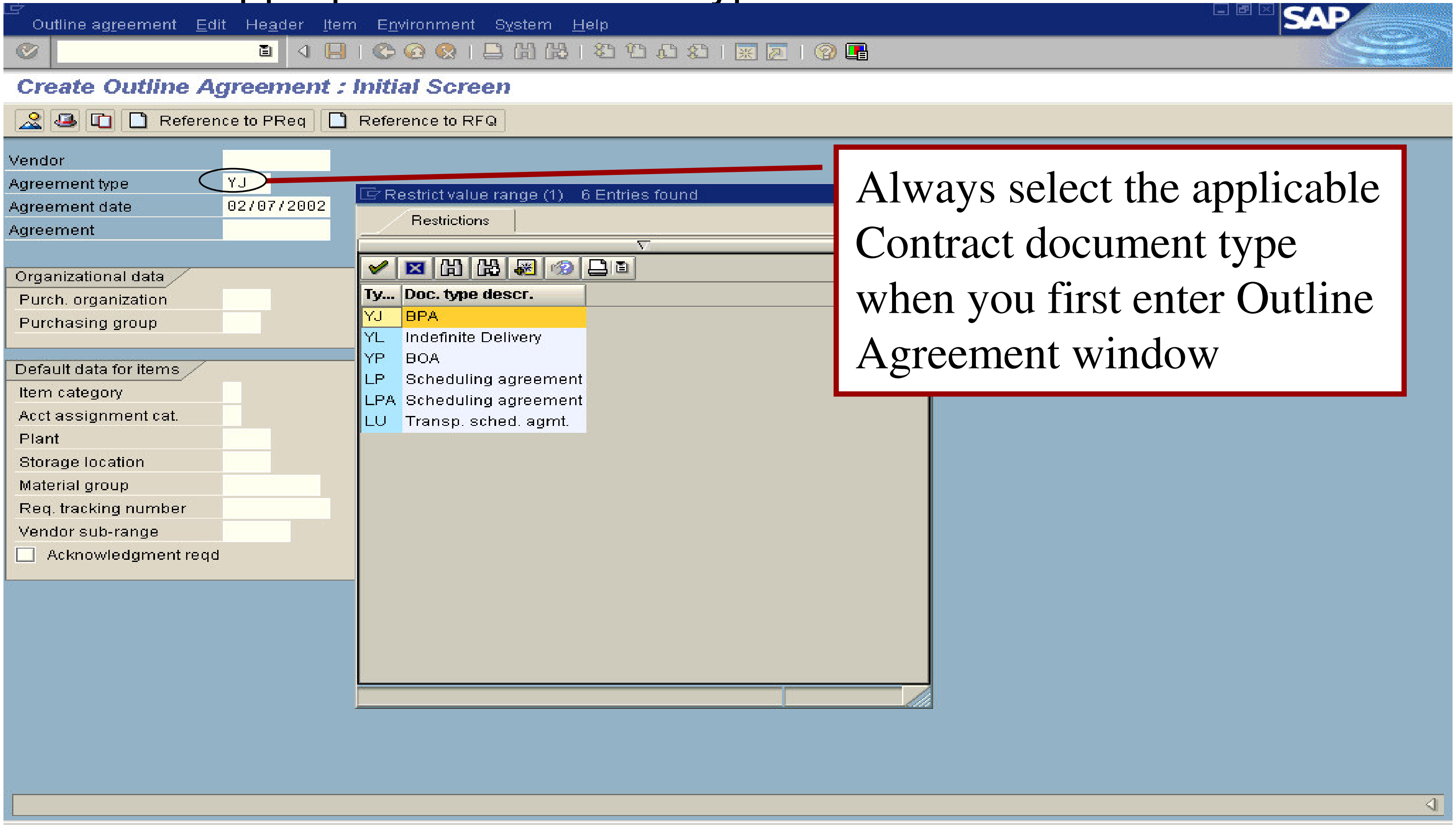
Prepare, Complete, and Process Contractual Documents

KEY POINTS:

- Select the appropriate contractual document type
- Select the appropriate input document (RFQ/PR), if applicable
- Complete the required fields for the contractual document
- Save the completed contractual document
- Attach required documents
- Review release documentation

Screenshot

Select the Appropriate Document Type


Outline agreement
Edit
Header
Item
Environment
System
Help
SAP
Reference to PReq
Reference to RFQ
Restrictions
Start
Inbox - Microsoft Outlook
IDIQ- BOA- BPA.ppt
Create Outline Agree...
10:21 AM

Create Outline Agreement : Initial Screen

Vendor	
Agreement type	YJ
Agreement date	02/07/2002
Agreement	

Organizational data

Purch. organization	
Purchasing group	

Default data for items

Item category	
Acct assignment cat.	
Plant	
Storage location	
Material group	
Req. tracking number	
Vendor sub-range	

☐ Acknowledgment reqd

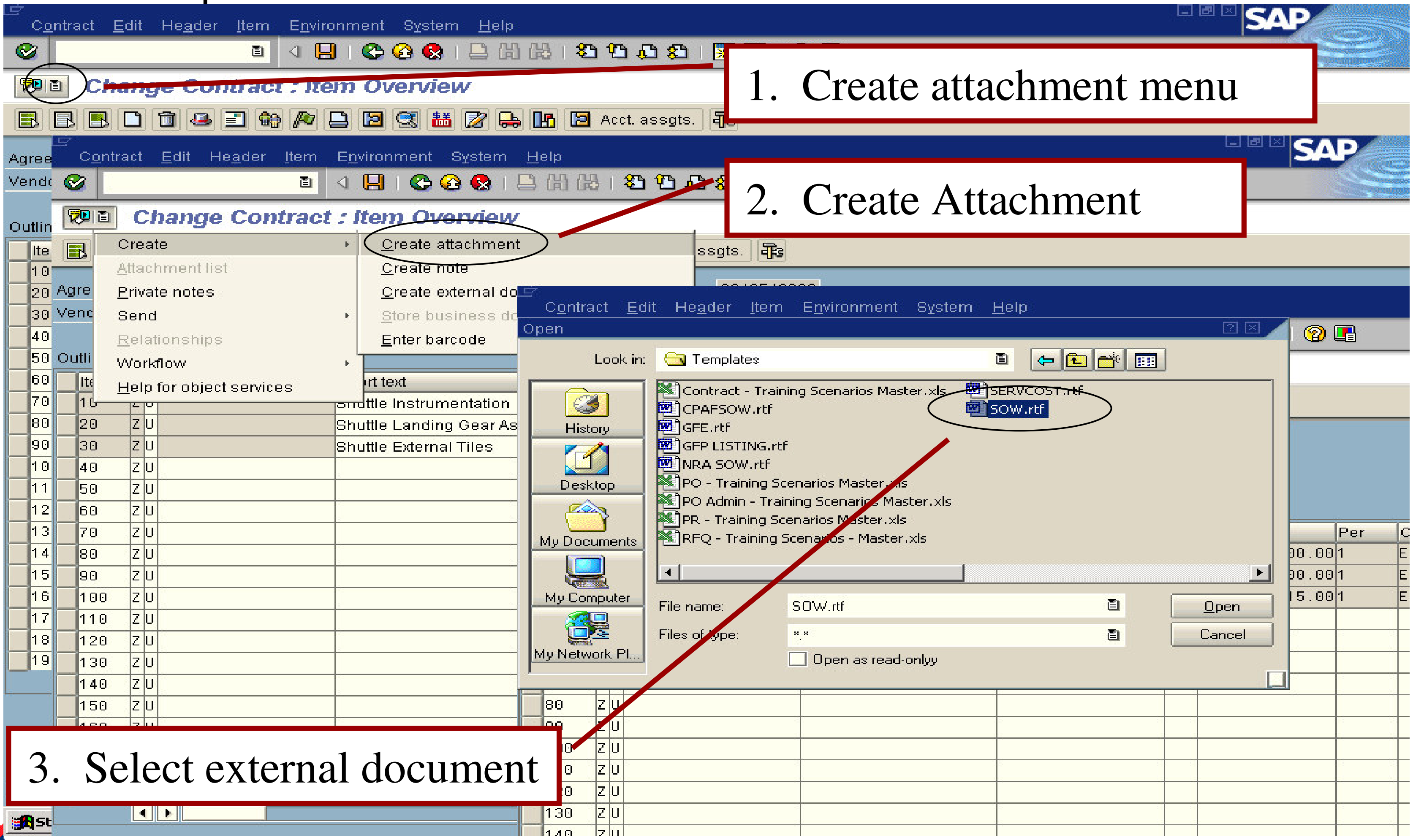
Restrict value range (1)   6 Entries found

Ty...	Doc. type descr.
YJ	BPA
YL	Indefinite Delivery
YP	BOA
LP	Scheduling agreement
LPA	Scheduling agreement
LU	Transp. sched. agmt.

Always select the applicable Contract document type when you first enter Outline Agreement window

Screenshot

Attach Required Documents



1. Create attachment menu

2. Create Attachment

3. Select external document

Contract Edit Header Item Environment System Help
Change Contract : Item Overview
Acct. assgts.
Create
Attachment list
Private notes
Send
Relationships
Workflow
Help for object services
Create attachment
Create note
Create external doc
Store business doc
Enter barcode
Open
Look in: Templates
History
Desktop
My Documents
My Computer
My Network Pl...
Contract - Training Scenarios Master.xls
CPAFSOW.rtf
GFE.rtf
GFP LISTING.rtf
NRA SOW.rtf
PO - Training Scenarios Master.xls
PO Admin - Training Scenarios Master.xls
PR - Training Scenarios Master.xls
RFQ - Training Scenarios - Master.xls
SERVCOST.rtf
SOW.rtf
File name: SOW.rtf
Files of type: *.*
Open as read-only
Open
Cancel
Shuttle Instrumentation
Shuttle Landing Gear As
Shuttle External Tiles

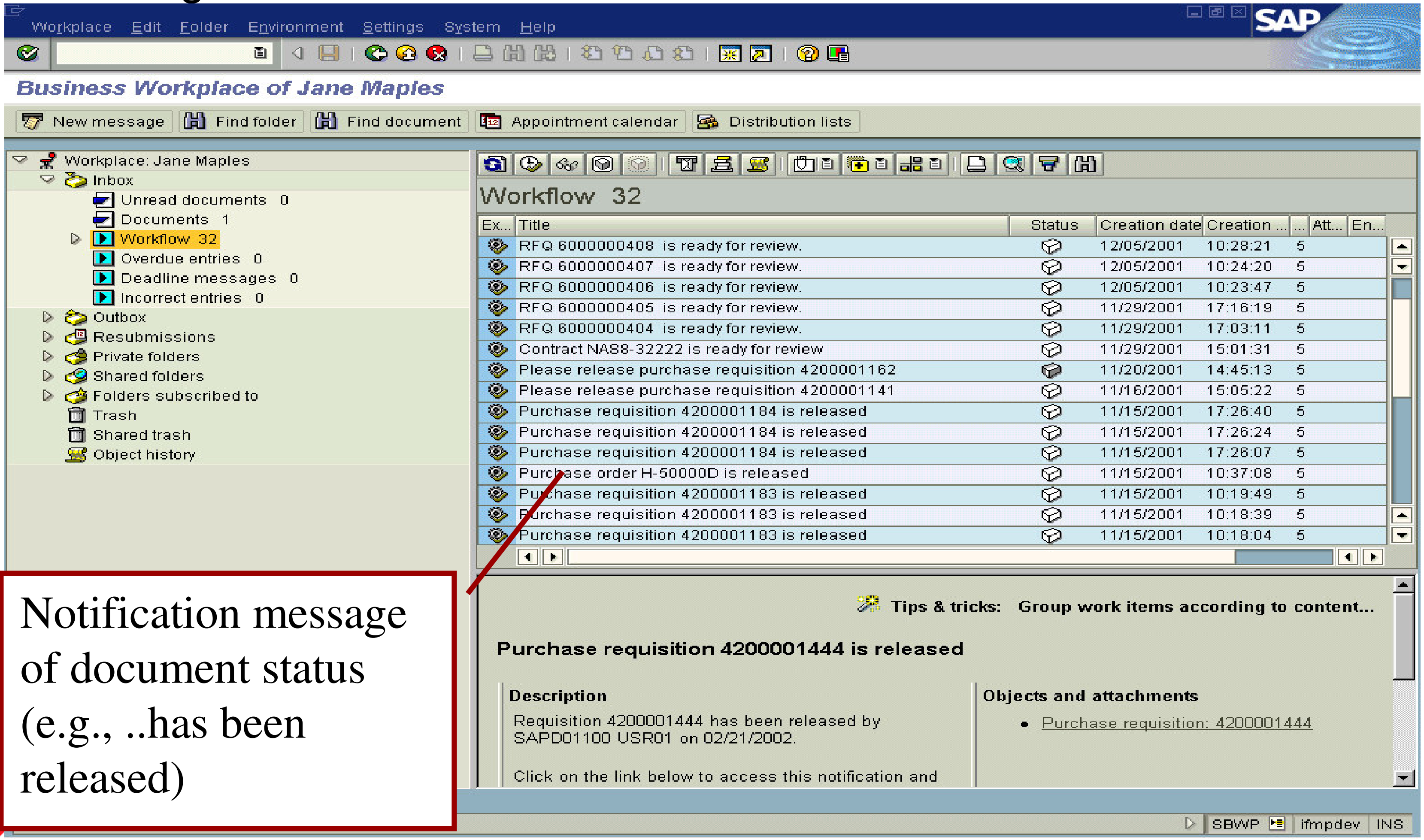
Distribute Contractual Documents

KEY POINTS:

- Printing award documents
- Emailing award documents
- Faxing award documents

Screenshot

Distributing Contractual Documents - Workflow Inbox


Workplace Edit Folder Environment Settings System Help
SAP
New message
Find folder
Find document
Appointment calendar
Distribution lists
Workplace: Jane Maples
Inbox
Unread documents 0
Documents 1
Workflow 32
Overdue entries 0
Deadline messages 0
Incorrect entries 0
Outbox
Resubmissions
Private folders
Shared folders
Folders subscribed to
Trash
Shared trash
Object history
SBWP
ifmpdev
INS

Business Workplace of Jane Maples

Workflow 32

Ex...	Title	Status	Creation date	Creation ...	...	Att...	En...
	RFQ 6000000408 is ready for review.		12/05/2001	10:28:21	5		
	RFQ 6000000407 is ready for review.		12/05/2001	10:24:20	5		
	RFQ 6000000406 is ready for review.		12/05/2001	10:23:47	5		
	RFQ 6000000405 is ready for review.		11/29/2001	17:16:19	5		
	RFQ 6000000404 is ready for review.		11/29/2001	17:03:11	5		
	Contract NAS8-32222 is ready for review		11/29/2001	15:01:31	5		
	Please release purchase requisition 4200001162		11/20/2001	14:45:13	5		
	Please release purchase requisition 4200001141		11/16/2001	15:05:22	5		
	Purchase requisition 4200001184 is released		11/15/2001	17:26:40	5		
	Purchase requisition 4200001184 is released		11/15/2001	17:26:24	5		
	Purchase requisition 4200001184 is released		11/15/2001	17:26:07	5		
	Purchase order H-50000D is released		11/15/2001	10:37:08	5		
	Purchase requisition 4200001183 is released		11/15/2001	10:19:49	5		
	Purchase requisition 4200001183 is released		11/15/2001	10:18:39	5		
	Purchase requisition 4200001183 is released		11/15/2001	10:18:04	5		

Tips & tricks: Group work items according to content...

Purchase requisition 4200001444 is released

Description

Requisition 4200001444 has been released by SAPD01100 USR01 on 02/21/2002.

Click on the link below to access this notification and

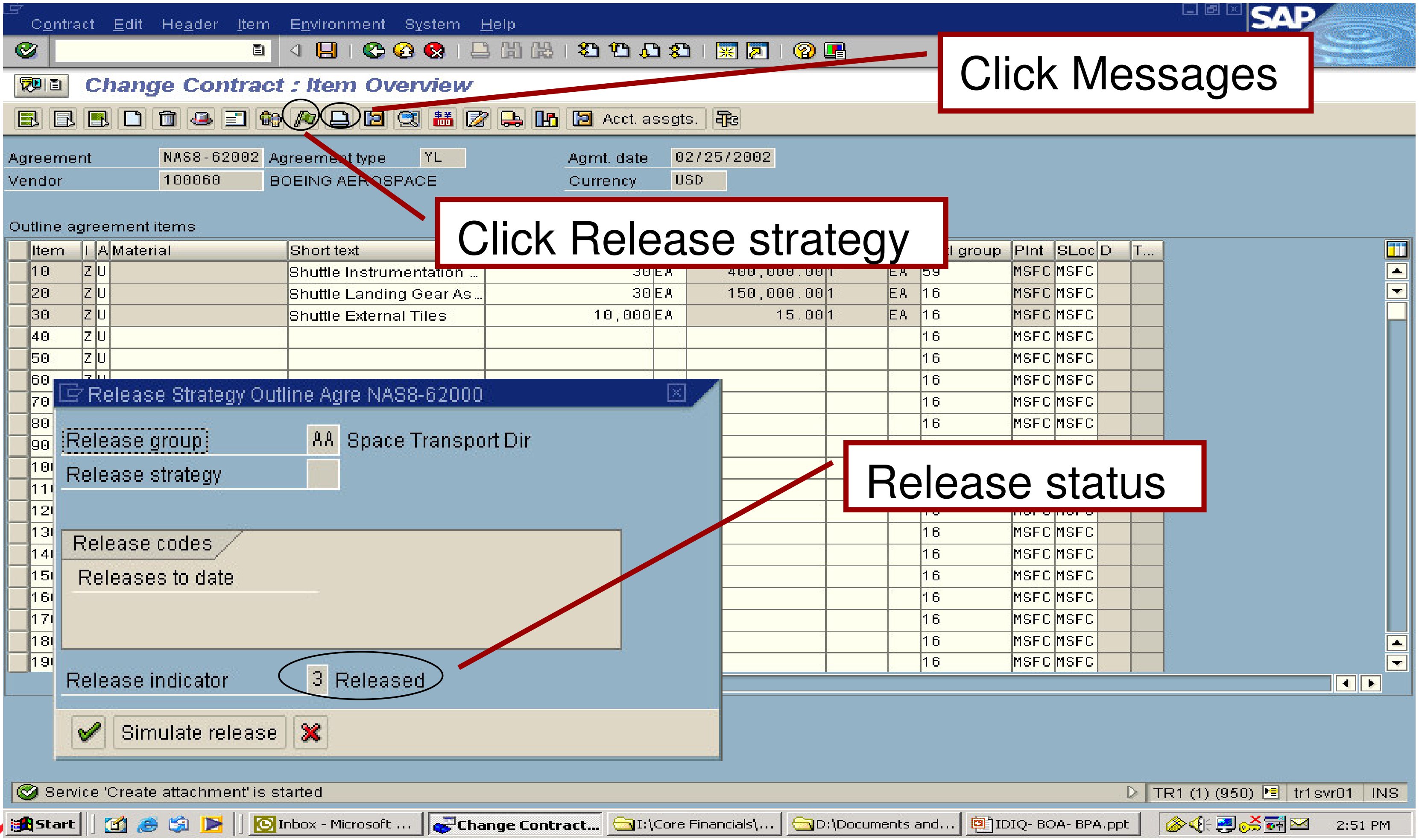
Objects and attachments

- Purchase requisition: 4200001444

Notification message of document status (e.g., ..has been released)

Screenshot

Distribute Contractual Document


Contract Edit Header Item Environment System Help
SAP
Acct. assgts.
Simulate release
Start
Inbox - Microsoft ...
Change Contract...
I:\Core Financials\...
D:\Documents and...
IDIQ- BOA- BPA.ppt
2:51 PM

Click Messages

Click Release strategy

Release status

Change Contract : Item Overview

Agreement NAS8-62002 Agreement type YL Agmt. date 02/25/2002
Vendor 100060 BOEING AEROSPACE Currency USD

Outline agreement items

Item	I	A	Material	Short text							Matl group	Plnt	SLoc	D	T...
10	Z	U		Shuttle Instrumentation ...	30	EA	400,000.00	1		EA	59	MSFC	MSFC		
20	Z	U		Shuttle Landing Gear As...	30	EA	150,000.00	1		EA	16	MSFC	MSFC		
30	Z	U		Shuttle External Tiles	10,000	EA	15.00	1		EA	16	MSFC	MSFC		
40	Z	U									16	MSFC	MSFC		
50	Z	U									16	MSFC	MSFC		
60											16	MSFC	MSFC		
70											16	MSFC	MSFC		
80											16	MSFC	MSFC		
90															
10															
11															
12															
13											16	MSFC	MSFC		
14											16	MSFC	MSFC		
15											16	MSFC	MSFC		
16											16	MSFC	MSFC		
17											16	MSFC	MSFC		
18											16	MSFC	MSFC		
19											16	MSFC	MSFC		

Release Strategy Outline Agre NAS8-62000

Release group AA Space Transport Dir
Release strategy

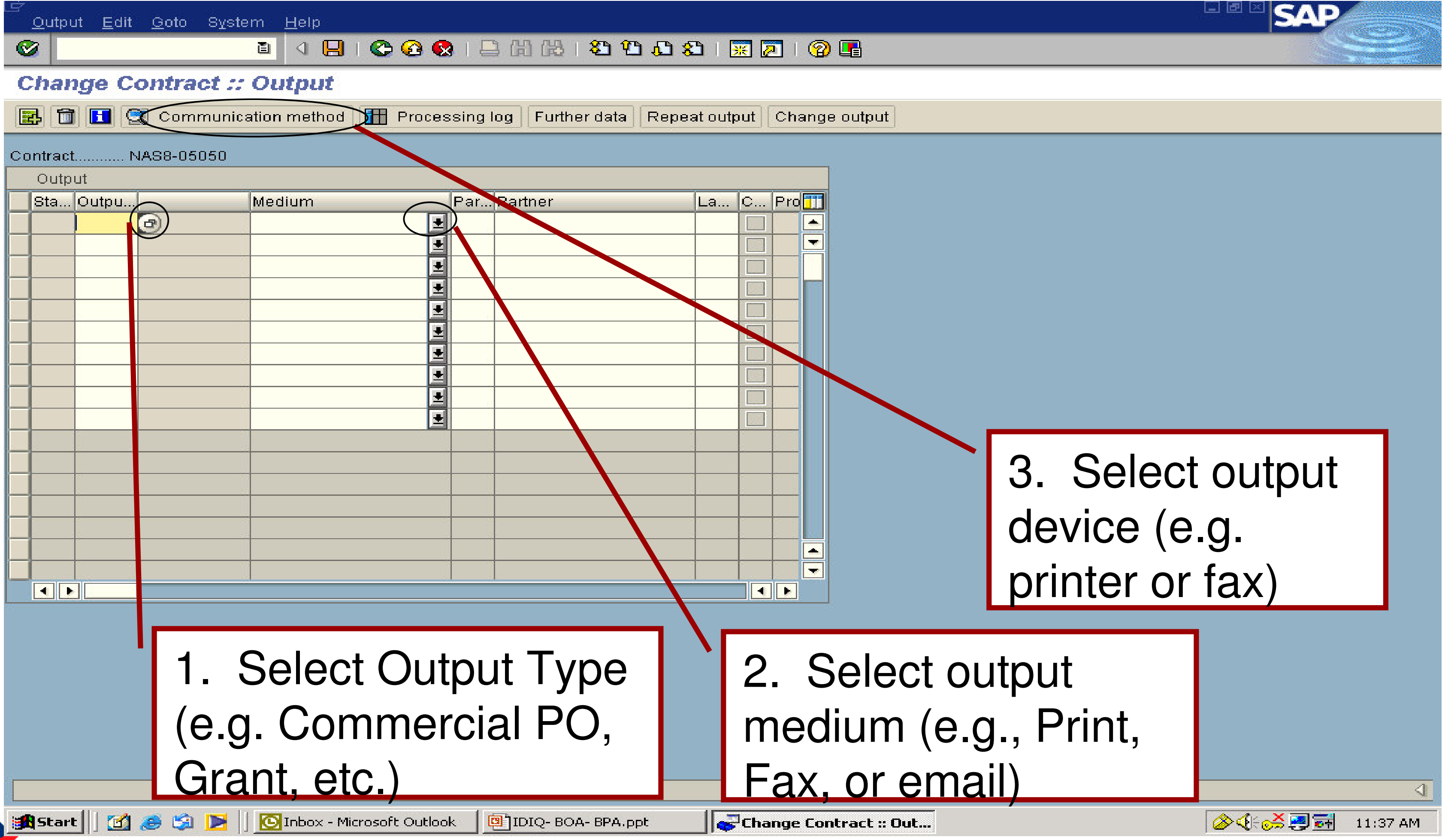
Release codes
Releases to date

Release indicator 3 Released

Service 'Create attachment' is started
TR1 (1) (950) tr1svr01 INS

Screenshot

- Distribute Contractual Document (continued)


Output Edit Goto System Help
SAP
Change Contract :: Output
Communication method
Processing log
Further data
Repeat output
Change output
Output
Sta...
Outpu...
Medium
Par...
Partner
La...
C...
Pro
Start
Inbox - Microsoft Outlook
IDIQ- BOA- BPA.ppt
Change Contract :: Out...
11:37 AM

Contract........... NAS8-05050

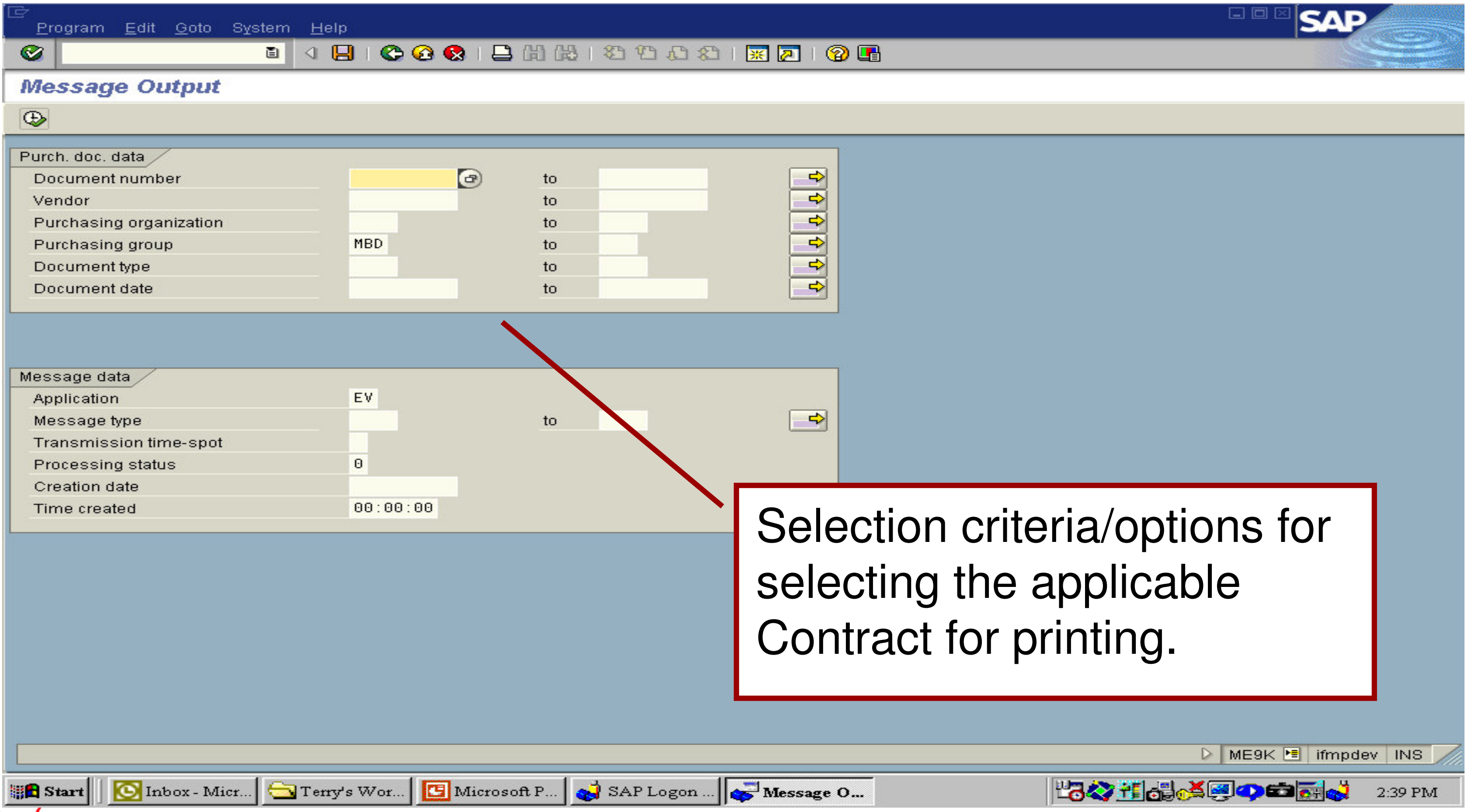
1. Select Output Type (e.g. Commercial PO, Grant, etc.)

2. Select output medium (e.g., Print, Fax, or email)

3. Select output device (e.g. printer or fax)

Screenshot

Distribute Contractual Documents – ME9K


Program Edit Goto System Help
SAP
Message Output
ME9K ifmpdev INS
Start
Inbox - Micr...
Terry's Wor...
Microsoft P...
SAP Logon ...
Message O...
2:39 PM

Purch. doc. data

Document number		to	
Vendor		to	
Purchasing organization		to	
Purchasing group	MBD	to	
Document type		to	
Document date		to	

Message data

Application	EV		
Message type		to	
Transmission time-spot			
Processing status	0		
Creation date			
Time created	00:00:00		

Selection criteria/options for selecting the applicable Contract for printing.

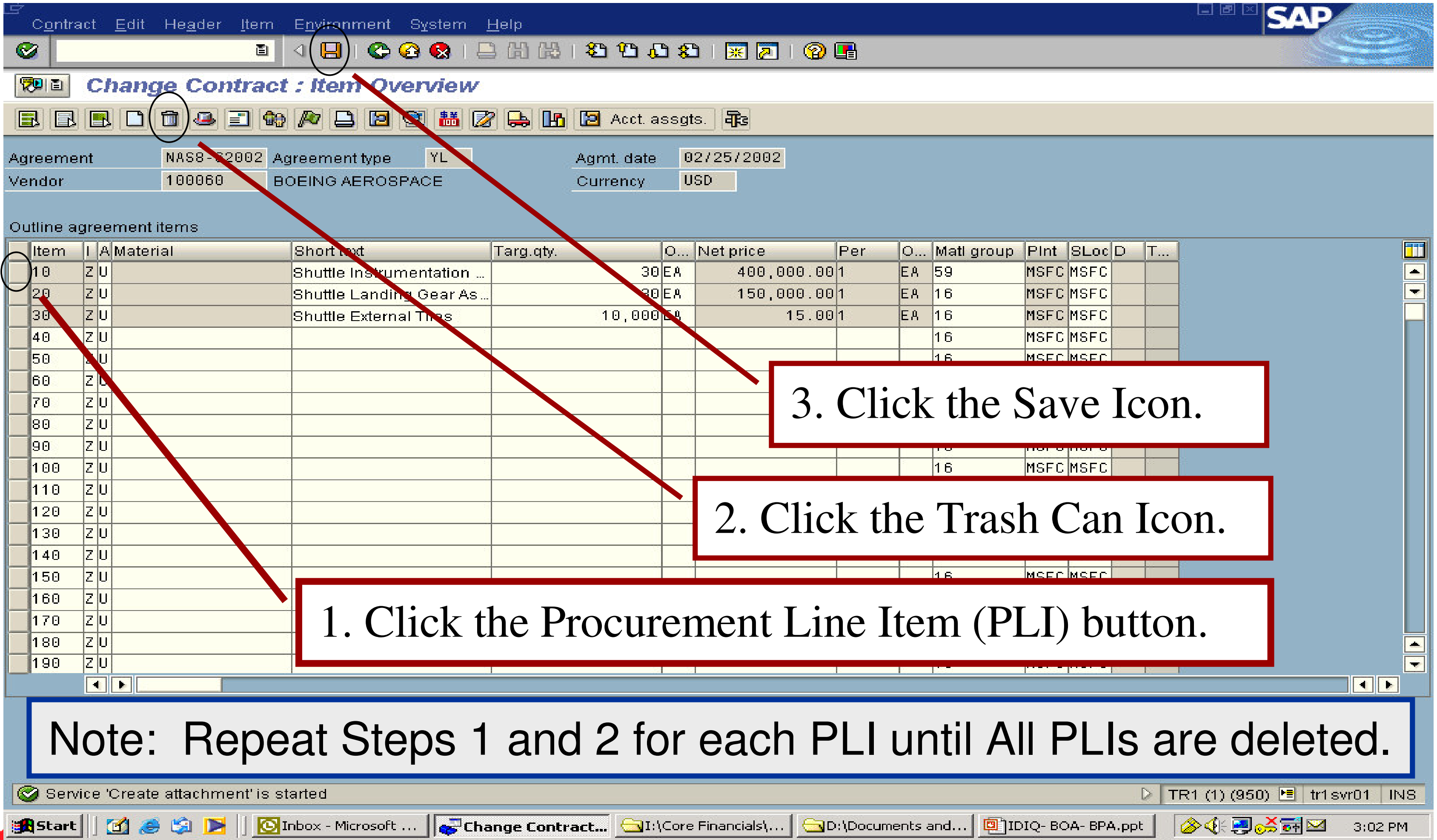
Cancel Contractual Documents

KEY POINT:

- How to cancel contractual documents

Screenshot

Cancel Contractual Document



Change Contract : Item Overview

Agreement	NAS8-[illegible]2002	Agreement type	YL
Vendor	100060	BOEING AEROSPACE	
Agmt. date	02/25/2002		
Currency	USD		

Outline agreement items

Item	I	A	Material	Short text	Targ.qty.	O...	Net price	Per	O...	Matl group	Plnt	SLoc	D	T...
10	Z	U		Shuttle Instrumentation ...	30	EA	400,000.00	1	EA	59	MSFC	MSFC		
20	Z	U		Shuttle Landing Gear As...	30	EA	150,000.00	1	EA	16	MSFC	MSFC		
30	Z	U		Shuttle External Tires	10,000	EA	15.00	1	EA	16	MSFC	MSFC		
40	Z	U								16	MSFC	MSFC		
50	Z	U								16	MSFC	MSFC		
60	Z	U												
70	Z	U												
80	Z	U												
90	Z	U												
100	Z	U								16	MSFC	MSFC		
110	Z	U												
120	Z	U												
130	Z	U												
140	Z	U												
150	Z	U								16	MSFC	MSFC		
160	Z	U												
170	Z	U												
180	Z	U												
190	Z	U												

Service 'Create attachment' is started

TR1 (1) (950) | tr1svr01 | INS

Inbox - Microsoft ... | Change Contract... | I:\Core Financials\... | D:\Documents and... | IDIQ- BOA- BPA.ppt | 3:02 PM

3. Click the Save Icon.

2. Click the Trash Can Icon.

1. Click the Procurement Line Item (PLI) button.

Note: Repeat Steps 1 and 2 for each PLI until All PLIs are deleted.

Demonstrations and Exercises

- Prepare, Complete, and Process Contractual Documents
- Distribute Contractual Documents
- Cancel Contractual Documents

Topic 1 Debrief

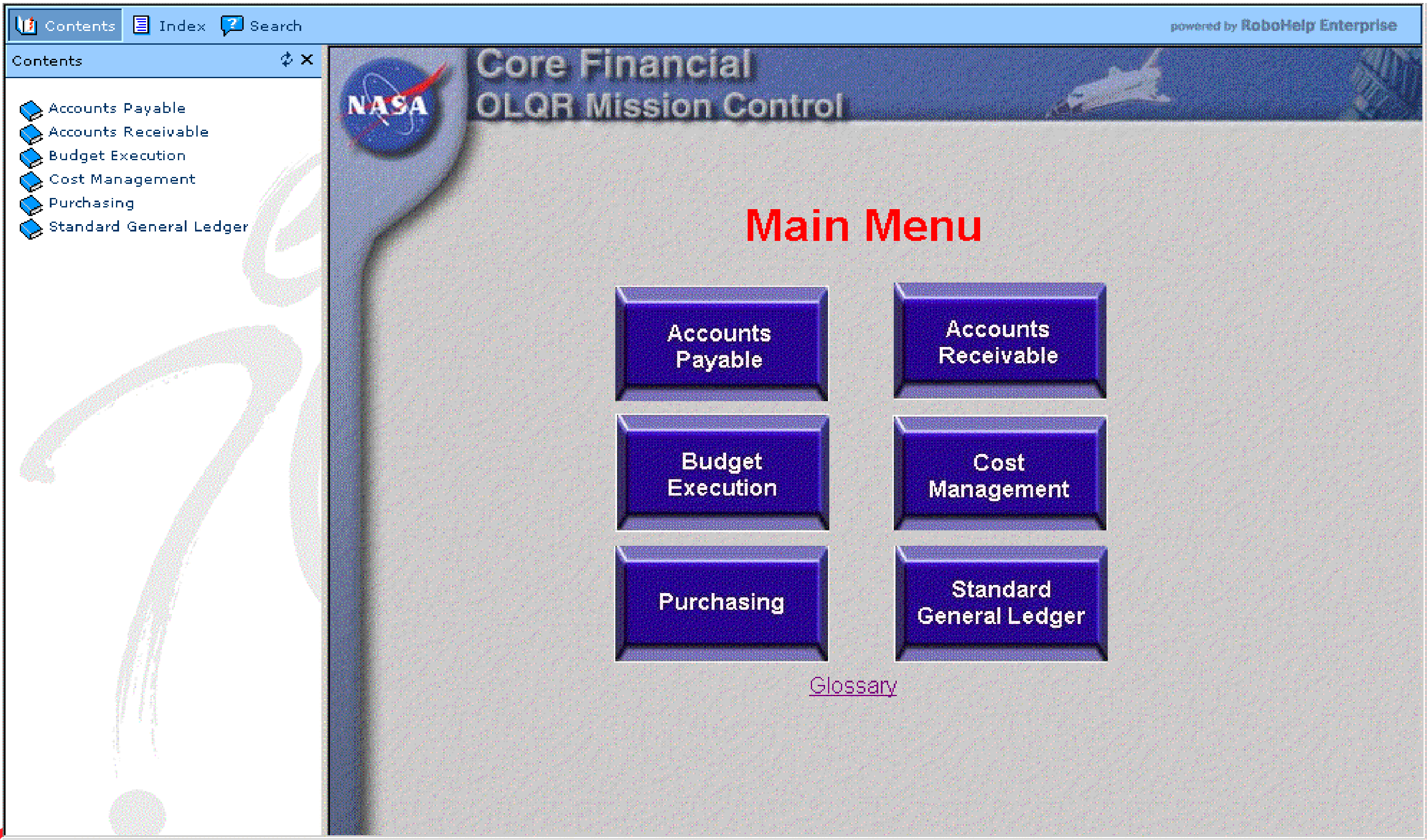
- The Buyer/CO prepares, completes, and processes contractual documents.
- Within SAP, contractual documents are automatically routed for approval when completed and saved.
- The COs/Procurement Team Leads review contractual documents
- The Buyer distributes the contractual documents.
- The Buyer cancels contractual documents.

Topic 2

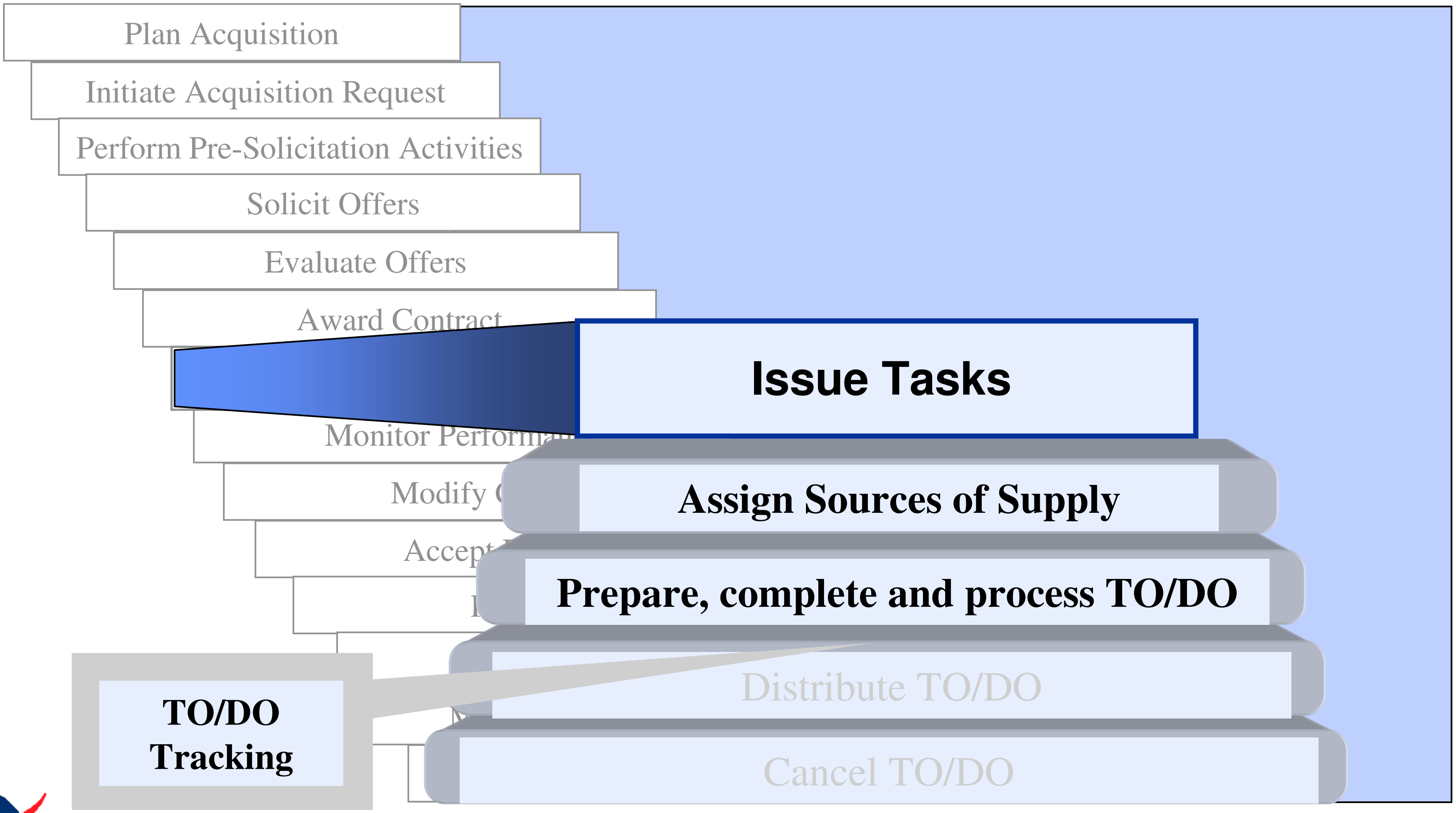
Issue Tasks

Topic 2: Process Flow

- Perform Issue Tasks Activities Process Flows from the OLQR


Contents
Index
Search
powered by RoboHelp Enterprise
Contents
Accounts Payable
Accounts Receivable
Budget Execution
Cost Management
Purchasing
Standard General Ledger
NASA
Core Financial
OLQR Mission Control
Main Menu
Accounts Payable
Accounts Receivable
Budget Execution
Cost Management
Purchasing
Standard General Ledger
Glossary

Topic 2: Overview



Plan Acquisition

Initiate Acquisition Request

Perform Pre-Solicitation Activities

Solicit Offers

Evaluate Offers

Award Contract

Issue Tasks

Monitor Perform

Modify C

Accept

I

Assign Sources of Supply

Prepare, complete and process TO/DO

Distribute TO/DO

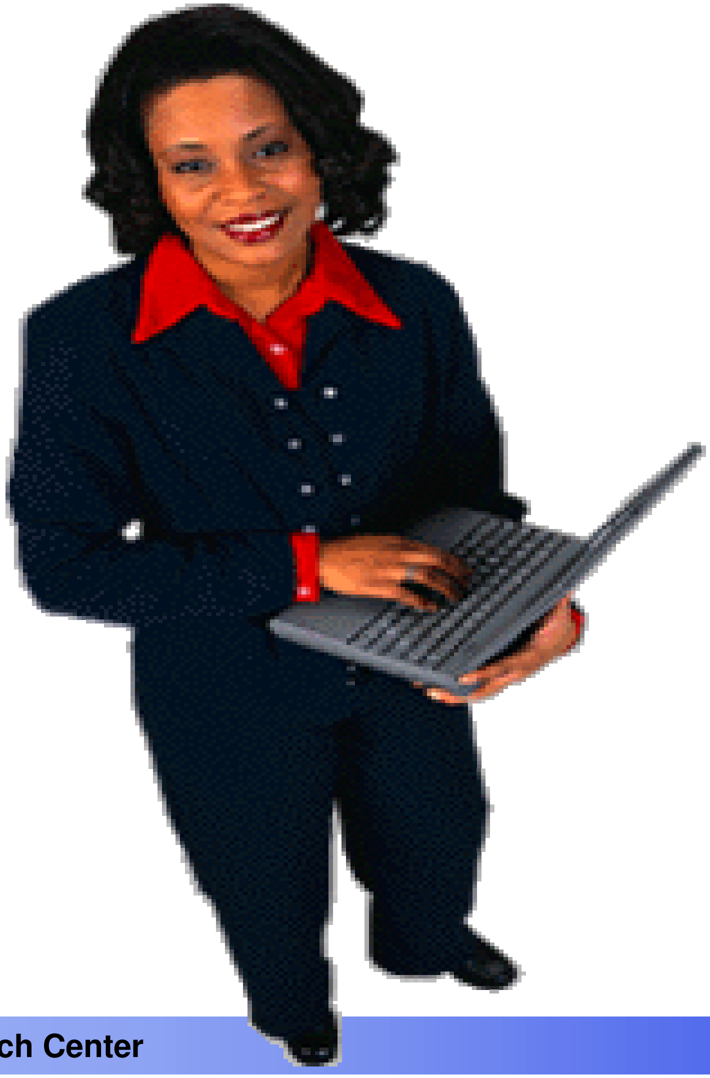
Cancel TO/DO

TO/DO Tracking

Topic 2: Objectives

- Upon completion of Issue Tasks, you should be able to accomplish the following:
  - Understand the Issue Tasks Process Flow
  - Assign Sources of Supply
  - Prepare, Complete, and Process TO/DOs
  - Track Issuance of TO/DOs

Demonstrations and Exercises Introduction



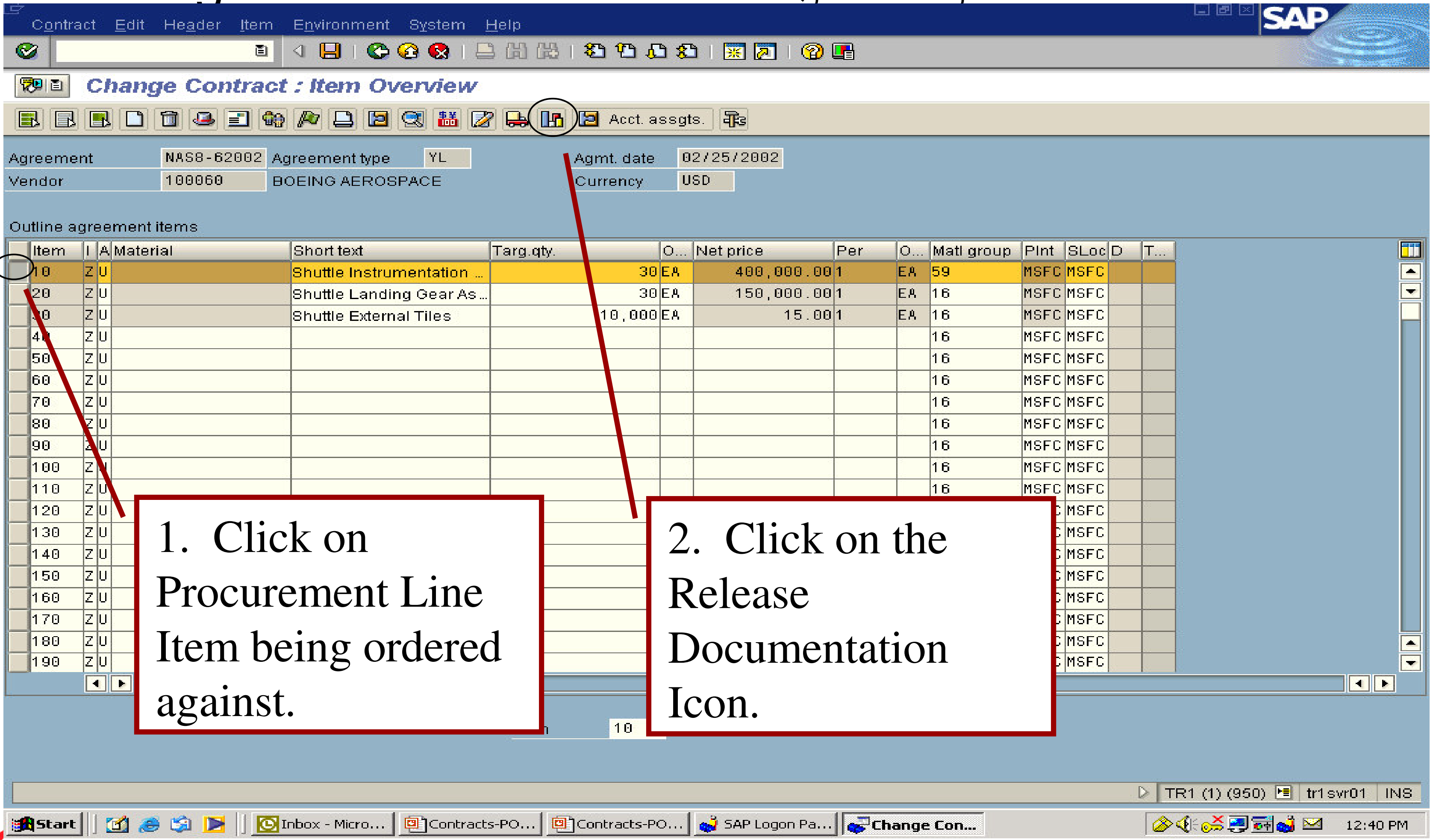
Assign Sources of Supply

KEY POINT:

- Review release documentation
- Select the appropriate source of supply

Screenshot

Checking for Order Limits - ID/IQ, BOA, or BPA



Contract Edit Header Item Environment System Help
SAP
Acct. assgts.
Start
Inbox - Micro...
Contracts-PO...
Contracts-PO...
SAP Logon Pa...
Change Con...
12:40 PM
TR1 (1) (950)
tr1svr01
INS

Change Contract : Item Overview

Agreement NAS8-62002 Agreement type YL Agmt. date 02/25/2002

Vendor 100060 BOEING AEROSPACE Currency USD

Outline agreement items

Item	I	A	Material	Short text	Targ.qty.	O...	Net price	Per	O...	Matl group	Plnt	SLoc	D	T...
10	Z	U		Shuttle Instrumentation ...	30	EA	400,000.00	1	EA	59	MSFC	MSFC		
20	Z	U		Shuttle Landing Gear As...	30	EA	150,000.00	1	EA	16	MSFC	MSFC		
30	Z	U		Shuttle External Tiles	10,000	EA	15.00	1	EA	16	MSFC	MSFC		
40	Z	U								16	MSFC	MSFC		
50	Z	U								16	MSFC	MSFC		
60	Z	U								16	MSFC	MSFC		
70	Z	U								16	MSFC	MSFC		
80	Z	U								16	MSFC	MSFC		
90	Z	U								16	MSFC	MSFC		
100	Z									16	MSFC	MSFC		
110	Z	U								16	MSFC	MSFC		
120	Z	U										MSFC		
130	Z	U										MSFC		
140	Z	U										MSFC		
150	Z	U										MSFC		
160	Z	U										MSFC		
170	Z	U										MSFC		
180	Z	U										MSFC		
190	Z	U										MSFC		

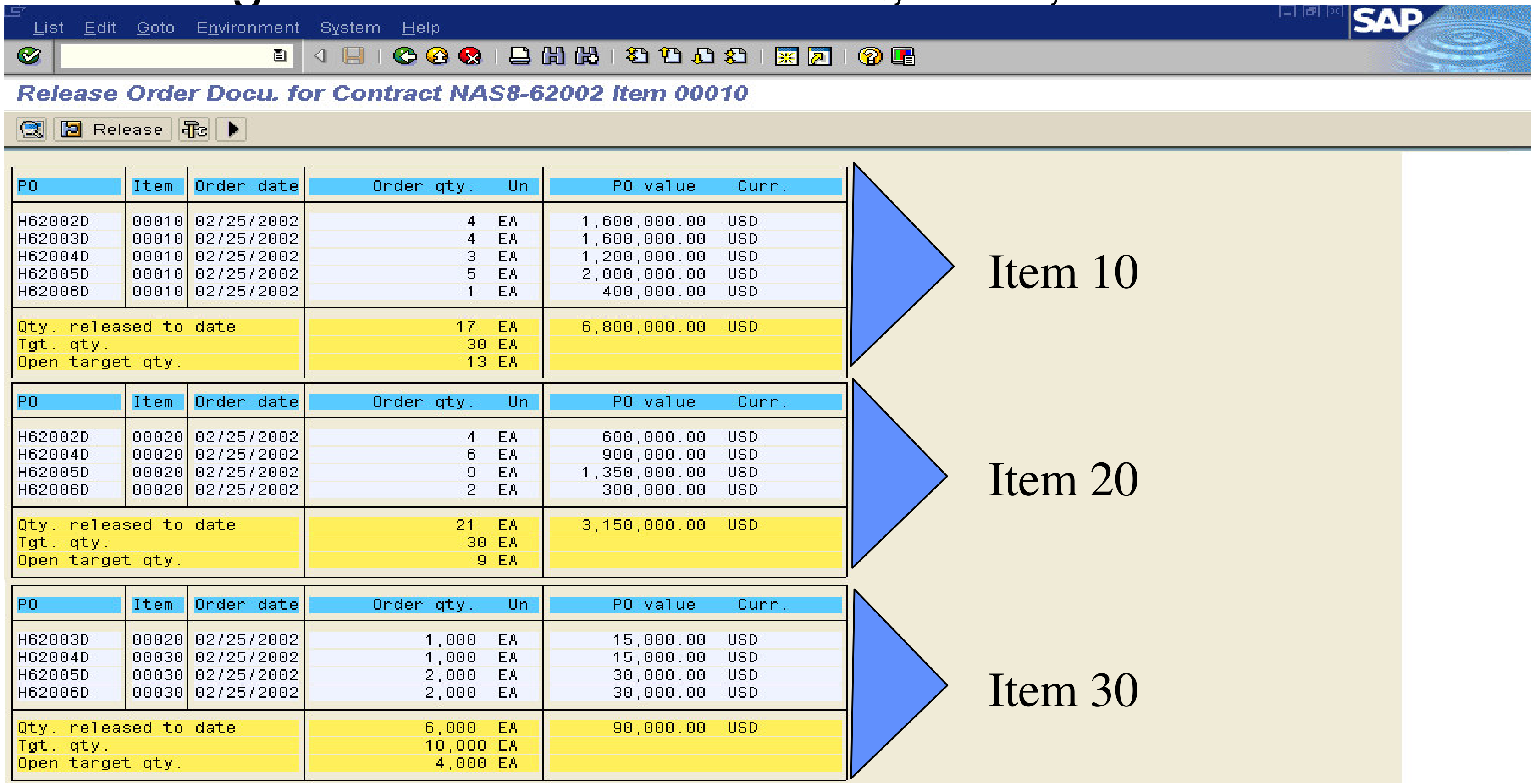
10

1. Click on Procurement Line Item being ordered against.

2. Click on the Release Documentation Icon.

Screenshot

Checking for Order Limits - ID/IQ, BOA, or BPA



Release Order Docu. for Contract NAS8-62002 Item 00010

PO	Item	Order date	Order qty.	Un	PO value	Curr.
H62002D	00010	02/25/2002	4	EA	1,600,000.00	USD
H62003D	00010	02/25/2002	4	EA	1,600,000.00	USD
H62004D	00010	02/25/2002	3	EA	1,200,000.00	USD
H62005D	00010	02/25/2002	5	EA	2,000,000.00	USD
H62006D	00010	02/25/2002	1	EA	400,000.00	USD
Qty. released to date			17	EA	6,800,000.00	USD
Tgt. qty.			30	EA		
Open target qty.			13	EA		

Item 10

PO	Item	Order date	Order qty.	Un	PO value	Curr.
H62002D	00020	02/25/2002	4	EA	600,000.00	USD
H62004D	00020	02/25/2002	6	EA	900,000.00	USD
H62005D	00020	02/25/2002	9	EA	1,350,000.00	USD
H62006D	00020	02/25/2002	2	EA	300,000.00	USD
Qty. released to date			21	EA	3,150,000.00	USD
Tgt. qty.			30	EA		
Open target qty.			9	EA		

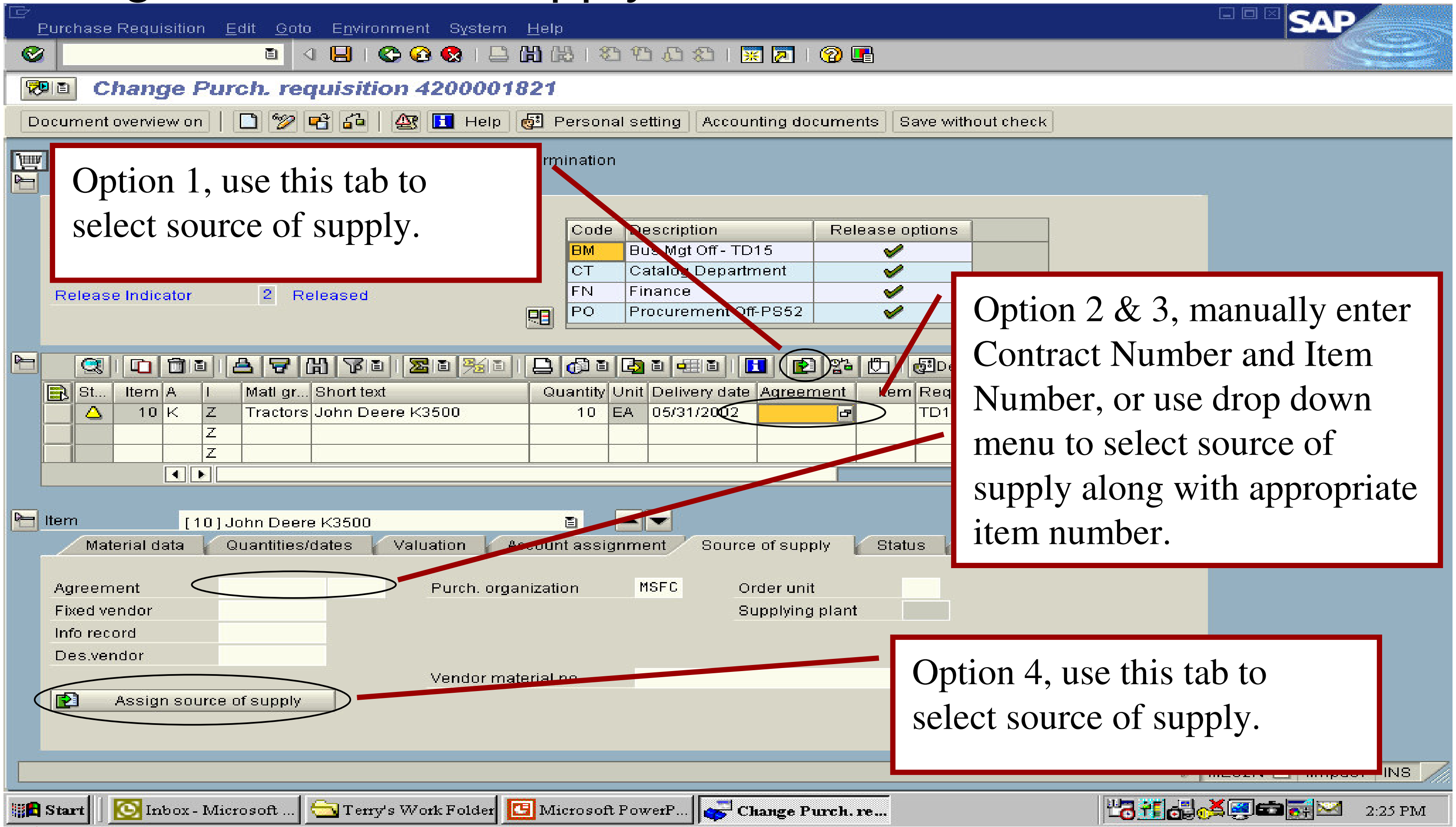
Item 20

PO	Item	Order date	Order qty.	Un	PO value	Curr.
H62003D	00020	02/25/2002	1,000	EA	15,000.00	USD
H62004D	00030	02/25/2002	1,000	EA	15,000.00	USD
H62005D	00030	02/25/2002	2,000	EA	30,000.00	USD
H62006D	00030	02/25/2002	2,000	EA	30,000.00	USD
Qty. released to date			6,000	EA	90,000.00	USD
Tgt. qty.			10,000	EA		
Open target qty.			4,000	EA		

Item 30

Assign Sources of Supply

Assign Sources of Supply: NASA Contracts


Purchase Requisition
Edit
Goto
Environment
System
Help
Document overview on
Help
Personal setting
Accounting documents
Save without check
Material data
Quantities/dates
Valuation
Account assignment
Source of supply
Status
Assign source of supply
Start
Inbox - Microsoft ...
Terry's Work Folder
Microsoft PowerP...
Change Purch. re...
2:25 PM

Change Purch. requisition 4200001821

Code	Description	Release options
BM	Bus Mgt Off - TD15	✓
CT	Catalog Department	✓
FN	Finance	✓
PO	Procurement Off-PS52	✓

Release Indicator 2 Released

St...	Item	A	I	Matl gr...	Short text	Quantity	Unit	Delivery date	Agreement	Item	Req
△	10	K	Z	Tractors	John Deere K3500	10	EA	05/31/2002			TD1
			Z								
			Z								

Item [10] John Deere K3500

Agreement
Fixed vendor
Info record
Des.vendor
Purch. organization MSFC
Order unit
Supplying plant
Vendor material no.

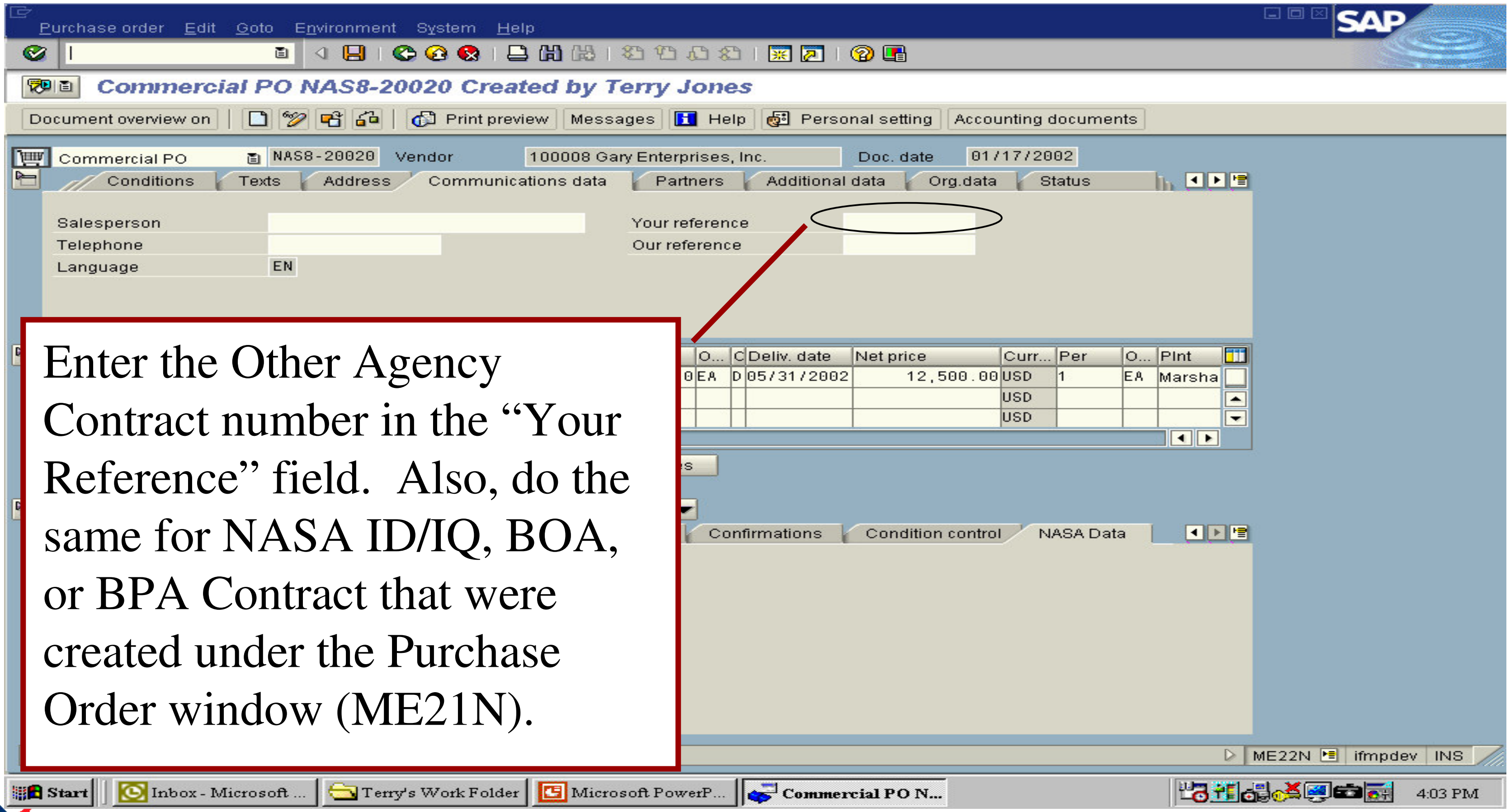
Option 1, use this tab to select source of supply.

Option 2 & 3, manually enter Contract Number and Item Number, or use drop down menu to select source of supply along with appropriate item number.

Option 4, use this tab to select source of supply.

Assign Sources of Supply

Assign Sources of Supply: Other Agency Contracts


Purchase order
Edit
Goto
Environment
System
Help
SAP
Document overview on
Print preview
Messages
Help
Personal setting
Accounting documents
Conditions
Texts
Address
Communications data
Partners
Additional data
Org.data
Status
Salesperson
Telephone
Language
Your reference
Our reference
Confirmations
Condition control
NASA Data
Start

Commercial PO NAS8-20020 Created by Terry Jones

Commercial PO NAS8-20020 Vendor 100008 Gary Enterprises, Inc. Doc. date 01/17/2002

Language EN

O...	C	Deliv. date	Net price	Curr...	Per	O...	Plnt
0 EA	D	05/31/2002	12,500.00	USD	1	EA	Marsha
				USD			
				USD			

ME22N ifmpdev INS

Inbox - Microsoft ... Terry's Work Folder Microsoft PowerP... Commercial PO N... 4:03 PM

Enter the Other Agency Contract number in the “Your Reference” field. Also, do the same for NASA ID/IQ, BOA, or BPA Contract that were created under the Purchase Order window (ME21N).

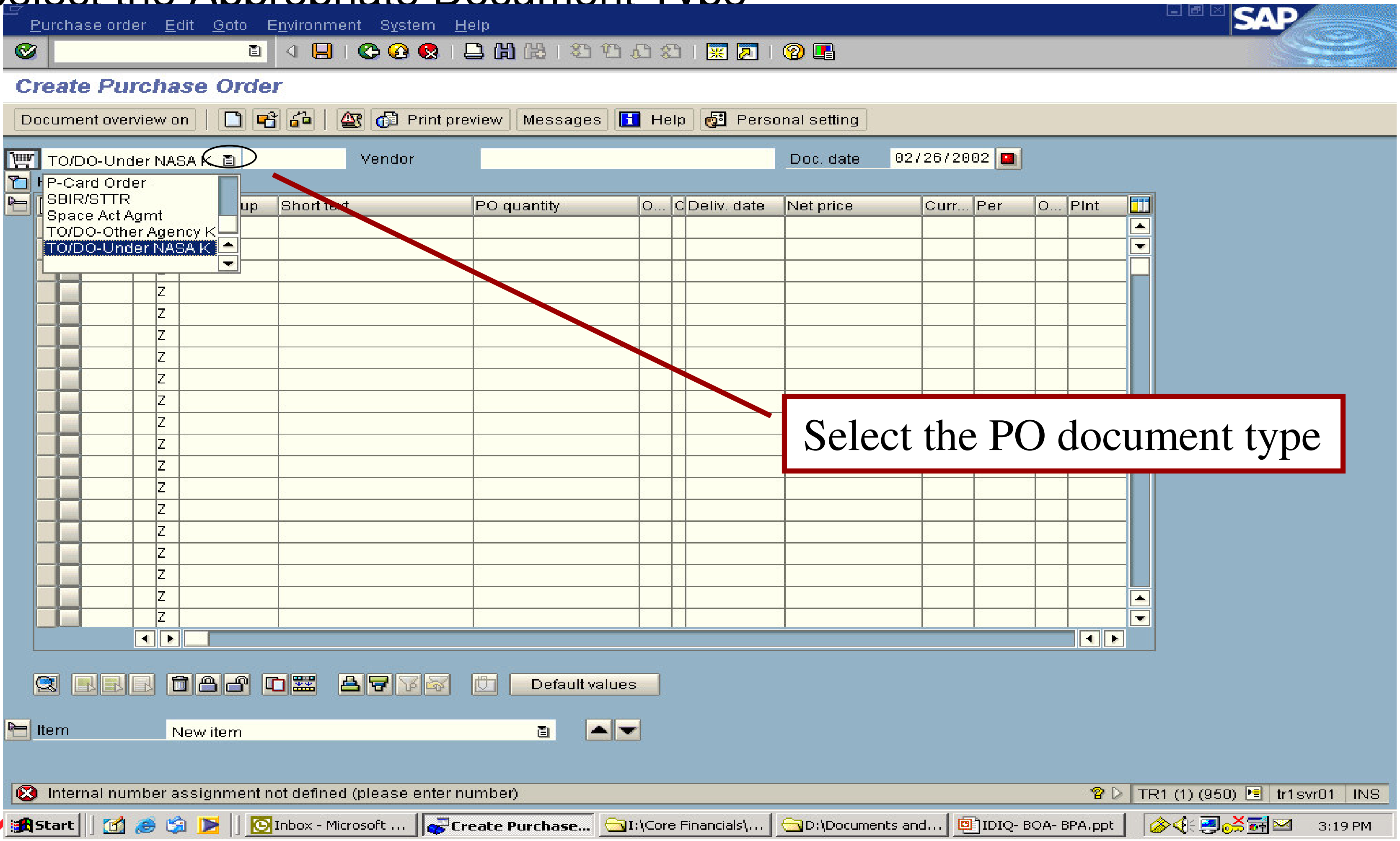
Prepare, Complete, and Process TO/DO

KEY POINTS:

- Check for order limits if applicable
- Select the appropriate document type
- Complete required inputs for the TO/DO document
- Review a completed document
- Save a completed document
- Attach documents

Screenshot

Select the Appropriate Document Type


Purchase order
Edit
Goto
Environment
System
Help
SAP
Create Purchase Order
Document overview on
Print preview
Messages
Help
Personal setting
Vendor
Doc. date
P-Card Order
SBIR/STTR
Space Act Agmt
TO/DO-Other Agency K
TO/DO-Under NASA K
Short text
PO quantity
O...
C
Deliv. date
Net price
Curr...
Per
O...
Plnt
Default values
Item
Start
Inbox - Microsoft ...
Create Purchase...
I:\Core Financials\...
D:\Documents and...
IDIQ- BOA- BPA.ppt

TO/DO-Under NASA K

Doc. date 02/26/2002

Item: New item

Internal number assignment not defined (please enter number)

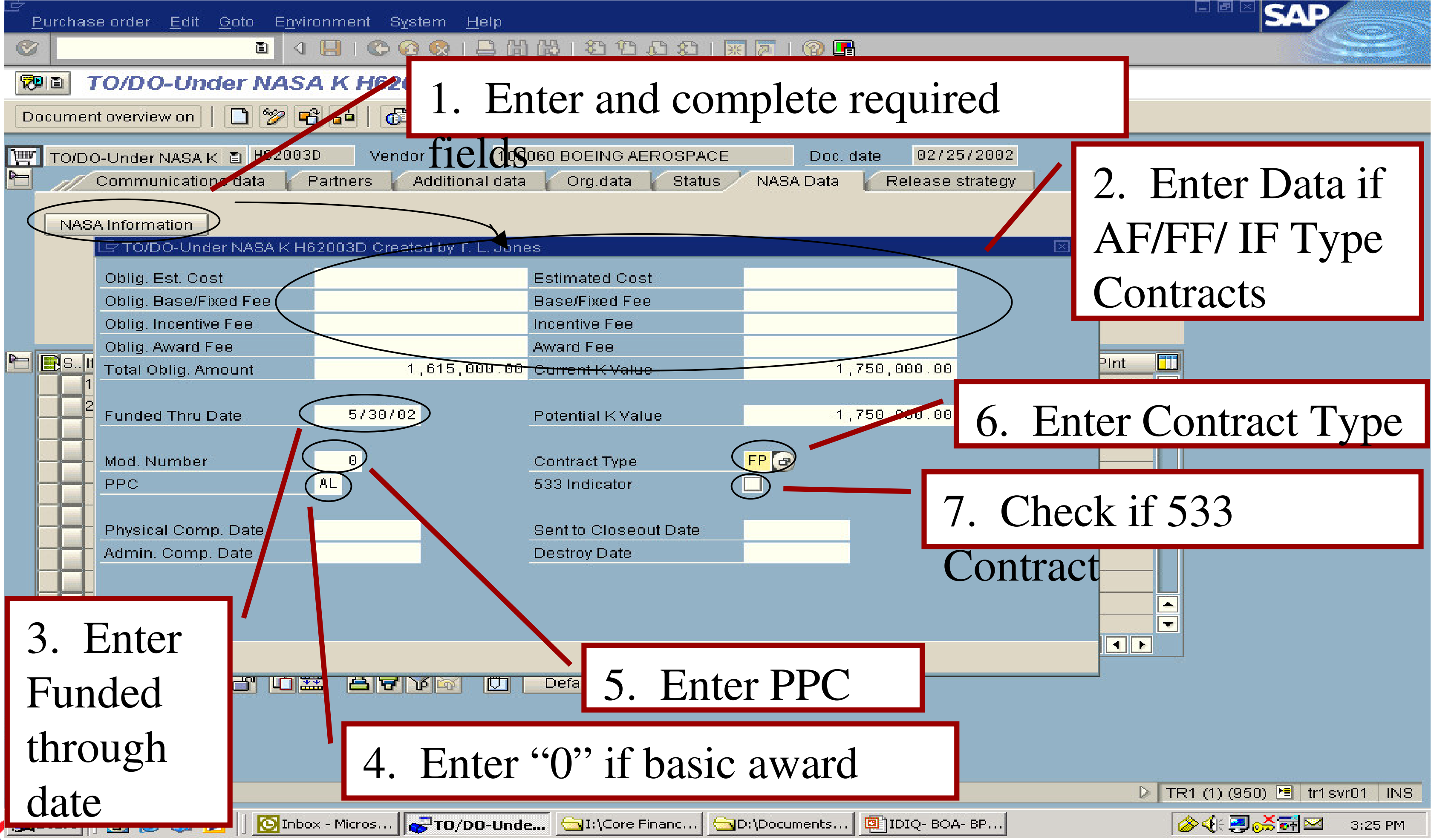
TR1 (1) (950) | tr1svr01 | INS

3:19 PM

Select the PO document type

Screenshot

Completing Required Data Inputs: NASA Information


Purchase order
Edit
Goto
Environment
System
Help
SAP
Document overview on
Communications data
Partners
Additional data
Org.data
Status
NASA Data
Release strategy
NASA Information
Defa
Inbox - Micros...
TO/DO-Unde...
I:\Core Financ...
D:\Documents...
IDIQ- BOA- BP...
3:25 PM

TO/DO-Under NASA K H62003D

TO/DO-Under NASA K H62003D Vendor 100060 BOEING AEROSPACE Doc. date 02/25/2002

TO/DO-Under NASA K H62003D Created by T. L. Jones

Oblig. Est. Cost		Estimated Cost	
Oblig. Base/Fixed Fee		Base/Fixed Fee	
Oblig. Incentive Fee		Incentive Fee	
Oblig. Award Fee		Award Fee	
Total Oblig. Amount	1,615,000.00	Current K Value	1,750,000.00
Funded Thru Date	5/30/02	Potential K Value	1,750,000.00
Mod. Number	0	Contract Type	FP
PPC	AL	533 Indicator	☐
Physical Comp. Date		Sent to Closeout Date	
Admin. Comp. Date		Destroy Date	

TR1 (1) (950) tr1svr01 INS

1. Enter and complete required fields

2. Enter Data if AF/FF/ IF Type Contracts

3. Enter Funded through date

4. Enter “0” if basic award

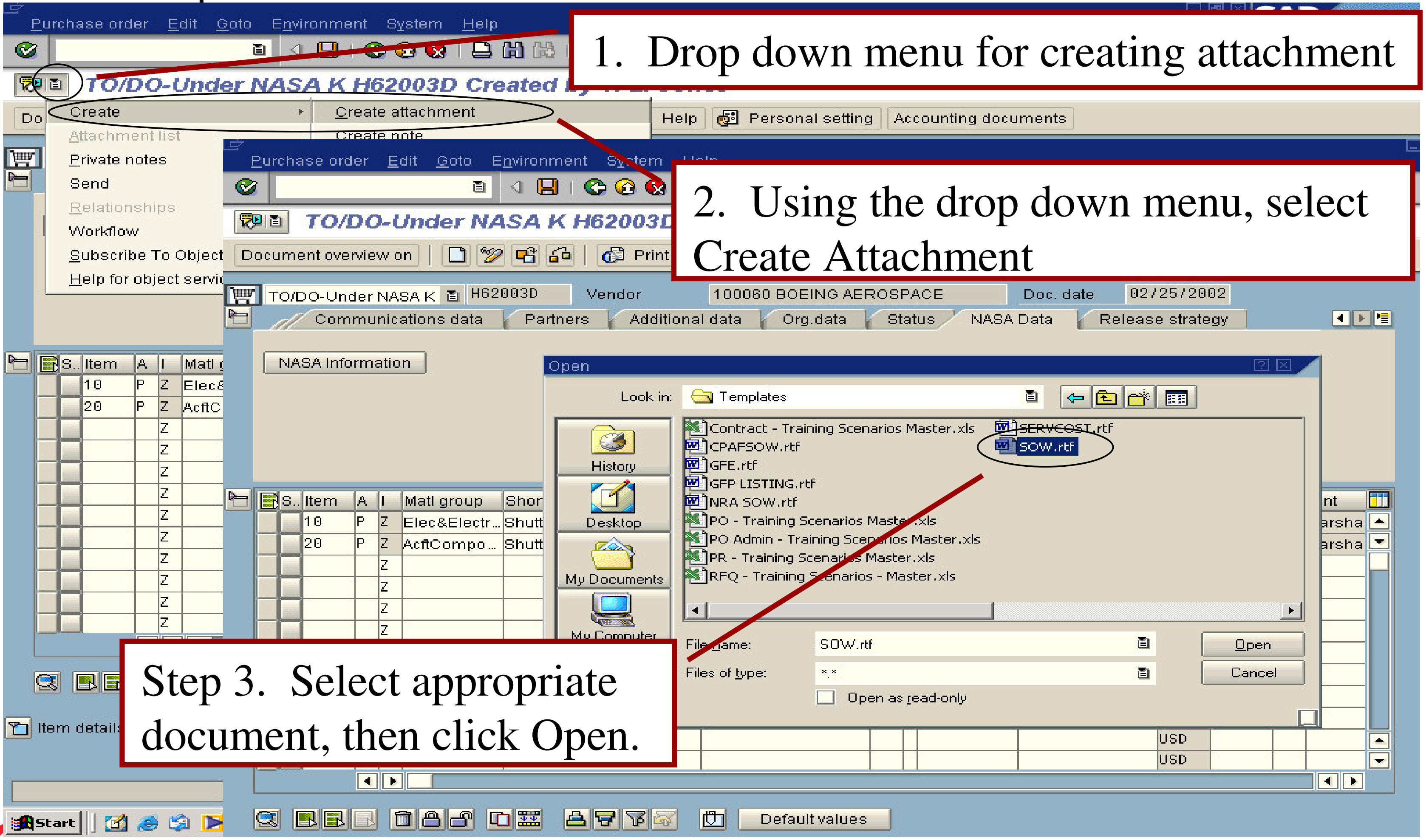
5. Enter PPC

6. Enter Contract Type

7. Check if 533 Contract

Screenshot

Attach Required Documents


1. Drop down menu for creating attachment

2. Using the drop down menu, select Create Attachment

Step 3. Select appropriate document, then click Open.

Purchase order Edit Goto Environment System Help
TO/DO-Under NASA K H62003D Created
Create
Create attachment
Create note
Attachment list
Private notes
Send
Relationships
Workflow
Subscribe To Object
Help for object servi
Document overview on
Print
TO/DO-Under NASA K H62003D
Vendor 100060 BOEING AEROSPACE
Doc. date 02/25/2002
Communications data
Partners
Additional data
Org.data
Status
NASA Data
Release strategy
NASA Information
Open
Look in: Templates
History
Desktop
My Documents
My Computer
Contract - Training Scenarios Master.xls
CPAFSOW.rtf
GFE.rtf
GFP LISTING.rtf
NRA SOW.rtf
PO - Training Scenarios Master.xls
PO Admin - Training Scenarios Master.xls
PR - Training Scenarios Master.xls
RFQ - Training Scenarios - Master.xls
SERVCOST.rtf
SOW.rtf
File name: SOW.rtf
Files of type: *.*
Open
Cancel
☐ Open as read-only
Item
Matl group
Elec&Electr...
AcftCompo...
Item details
Default values
Start

Demonstrations and Exercises

- Assign Source of Supply
- Prepare, Complete, and Process TO/DO
- TO/DO Tracking

Topic 2 Debrief

- The Buyer/CO and Procurement Team Lead understand the Issue Tasks Process Flow
- The Procurement Team Lead checks order limits and assigns the sources of supply if not assigned by the requisitioner
- The Buyer/CO prepares, completes, and processes TO/DOs
- Within SAP, contractual documents are automatically routed for approval when completed and saved.
- Upon approval, the Buyer will review the basic contract to ensure correct posting of the TO/DO amount.

End of Course Review

Review Objectives & Expectations

Everyone here should now be able to:

- ✓ Award Contracts
- ✓ Issue Tasks

Available Resources

- SAP Practice Training Instance
- OLQR
- Super-users within each department
- Job Aids

Extra Practice - SAP Training Instance

- Use data from course training guide to practice transactions

The training database provides a “safe” environment to develop and practice skills without affecting production.

Congratulations!

Training Course Feedback

- The on-line training course feedback will:
  - Assess the effectiveness of the instruction and training materials for the course
- To access the feedback form:
  - Launch your Web Browser
  - Enter the following URL address: http://www.zoomerang.com/recipient/survey-intro.zgi?ID=S92WBAWLSKWA&PIN=994RHHDW8RK7
  - Complete and submit feedback by following the directions within the on-line form